

Perceptions of Patron Driven Acquisitions from members of staff
at a UK academic library: is it an effective and efficient method of
acquiring eBooks?

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Abstract

Patron Driven Acquisitions (PDA) is a relatively recent method of acquiring items for a university library whereby users are given the opportunity to purchase content based on their needs rather than relying on material selected and bought by library staff. This is commonly referred to as a 'just-in-time' model as opposed to the traditional 'just-in-case' model, which often results in the purchase of material which is seldom or never used. It is held to be a particularly useful tool in times of budget restrictions as it allows for the inclusion of a large amount of unpurchased material in a catalogue.

This study investigates whether PDA, currently utilised by Library Y at University X, is considered by six relevant members of staff to be an effective and efficient method of eBook acquisition. The members of staff chosen for the study include four Subject Librarians, the Chief Library Assistant (Acquisitions) and the Electronic Resources Librarian, all of whom have had relevant experience of PDAs.

A critical evaluation of the existing pertinent literature led to the creation of a set of interview questions which were posed to these members of staff. The interviews were held, statistical data was gathered and analysis of both was undertaken.

The interviews reveal that PDA is felt to be a worthwhile method of purchase but with significant drawbacks with regards to implementation. Overall, staff are happy to use it. Usage and cost figures show that even though PDA eBooks are used more than Subject Librarian selected material, their costs are not significantly less. Interviewees stress that, despite much work being needed to implement a PDA program, the benefits to users outweigh any disadvantages to staff.

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Abbreviations

DDA	Demand Driven Acquisitions
EBA	Evidence Based Acquisitions
ILL	Interlibrary Loans
ILS	Integrated Library System
LMS	Library Management System
MARC	Machine Readable Cataloguing
NSS	National Student Survey
OPAC	Online Public Access Catalogue
PDA	Patron Driven Acquisitions
SSLC	Staff Student Liaison Committee

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1. Introduction

1.1. Introduction

Academic libraries have seen significant changes in recent years. An increase in tuition fees has led to students expecting more for their money, including wanting the provision of an abundance of superior resources. A decline in library budgets is making this target increasingly difficult to meet.

Traditionally, resources have been chosen by liaison between lecturers who provide reading lists and Subject Librarians who analyse the lists, making decisions about which titles and how many of them to buy. Also, librarians browse publishers' catalogues, selecting suitable additional content to complement the lists. However, Tynan and McCarney (2014) highlight the fact that studies conducted by Trueswell in 1969 and Kent in 1979 suggest that this purchasing model does not always effectively satisfy users' information needs and that alternative options should be considered.

1.1.1. What is PDA?

The introduction of Patron Driven Acquisitions (PDA) into the library is one method of ensuring that funds are being spent on materials that will actually be used. Dahl (2012, p. 119) explains that Patron Driven Acquisitions (with regards to eBooks) is the automated practice of enabling the library user to select and ultimately purchase items for the library and that this is

most often through the process of clicking on records that have been added to their library's catalogue. The records of titles available for purchase are added to the catalogue based on profiles and parameters set by the library and, in most cases, can be either browsed or clicked on a set number of times before a purchase...is triggered.

Much of the literature on this topic focuses on three main areas: - usage studies, recognition that there are both benefits and drawbacks to Patron Driven Acquisitions which libraries considering implementing such programs should take into account and, to a lesser extent, operational issues (Schroeder et al., 2010; Medeiros, 2011; Polanka and Delquié, 2011; Sens and Fonseca, 2013; Downey et al., 2014). The available literature seems to concentrate on one or other of these areas. As this method of stock acquisition is still relatively new it would be useful for libraries considering whether or not to adopt

Patron Driven Acquisitions to have an overall view of the whole process, from set-up to implementation and to gain insight into the thoughts and opinions of staff members who have practical experience of the process. This dissertation seeks to address this.

1.1.2. Clarification of the terminology

The literature uses many terms to refer to Patron Driven Acquisitions. ‘PDA’; ‘Demand-driven acquisitions’ (DDA); ‘User-driven acquisitions’; ‘Patron-initiated purchasing’ all seem interchangeable. This study will use ‘Patron Driven Acquisitions’ (hereafter referenced throughout the dissertation by the acronym PDA), primarily because this is the term most frequently used by the staff at Library Y.

It should also be noted here that the literature often uses the terms ‘patron’ and ‘library patron’ but this study will refer to the ‘user’ and/or ‘student’ as, again, this is in line with the vocabulary used at Library Y.

1.2. PDA at Library Y: a case study

This study of PDA concentrates on the experiences of one academic library only – Library Y. The University of X is a thriving Higher Education institution located in the North of England. Library Y is integral to the success of the organisation and its purpose is to provide relevant resources to over 13,000 undergraduate and postgraduate students as well as its academic staff.

As technology advances many of these resources are increasingly electronic in nature, which is extremely beneficial to the university’s many off-campus users (studying by means of distance learning courses) but it also enables developments to the way in which the resources can be selected and acquired, PDA being one of these developments. At this Northern English university library, the staff most involved with the PDA process are the Subject Librarians, the Electronic Resources Librarian and the Chief Library Assistant (Acquisitions).

1.2.1. Background

In early 2015 the aforementioned members of staff at Library Y invited four vendors to demonstrate their PDA programs and by May 2015 live PDAs were in place with Vendor 1 and Vendor 2. The set up involved:

- Depositing of funds to Vendor 1 and Vendor 2 PDA accounts; and the signing of license agreements.
- Making decisions about subject areas and classmark ranges to be included (displayed in Tables 1 and 2).
- Making decisions about price caps; publication year ranges; rental vs auto-purchase; licensing model preferences; possible exclusion of publishers; readership level.
- Acquisitions staff producing a file of eBook titles already owned by the library for de-duplication purposes.
- Vendors producing a list of compatible content.
- Acquisitions staff de-duplicating these lists.
- EZproxy linking set up with the eBook platforms.
- MARC records being produced by the vendors and loaded and augmented onto the LMS by Acquisitions staff.

Subject Area	Classmark Range
Vendor 1 Social Sciences	150 – 157.999
	172 – 172.999
	174 – 174.999
	300 – 302.599
	303 – 329.999
	334 – 335.999
	341 – 341.999
	350 – 352.999
	354 – 355.999
	358 – 365.999
	379 – 379.999
	950 – 969.999
	980 – 989.999
Vendor 2 Management	650 and 659.999
	330 and 339.999
	380 – 389.999
Vendor 2	292 – 293.99

Archaeology	306.9 738 930.1 – 939.9 940-949
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Table 1 - PDA classmark ranges (2015)

Subject Area	Classmark Range
Vendor 1 Business and Management	330 350 – 354 380 – 382 650 657 659
Vendor 1 Law	340
Vendor 2 Life Sciences, Optometry and Health	500s 600s, excluding 650s
Vendor 2 Social Sciences and Archaeology	150 – 157.999 172 – 172.999 174 – 174.999 291 – 293.999 297 – 297.999 300 – 302.599 303 – 329.999 334 – 335.999 341 – 341.999 350 – 352.999 354 – 355.999 358 – 365.999 379 – 379.999 393 – 393.999

	738 – 738.999
	930 – 969.999
	972 – 972.999
	980 – 999.999

Table 2 - PDA classmark ranges (2016)

After discussion amongst the University Librarian and relevant Subject Librarians the following parameters were agreed upon

Vendor 1

All relevant subjects (excluding Law):

- Price cap of £150
- Users permitted 3 requests in any 24 hour period
- Auto-purchase – 5 minute free view after which the user is asked if they would like to continue; if ‘yes’ is selected the book is purchased.

Law only:

As above but with the extra specifications

- Publication year of 2012 –
- UK law only

Vendor 2

Life Sciences, Optometry and Health:

- Price cap of £200
- Users permitted 3 requests in any 24 hour period
- Publication year of 1990 –
- One rental step prior to auto-purchase – 5 minute free view after which the user is asked if they would like to continue; if ‘yes’ is selected there is a rental. If a second user accesses the book there is another 5 minute free view and if the user answers ‘yes’ to “do you want to continue?” the book is purchased.

Social Sciences:

- Price cap of £150 for tertiary level titles
- Users permitted 3 requests in any 24 hour period
- Publication year of 2006 –
- Auto-purchase – 5 minute free view after which the user is asked if they would like to continue; if ‘yes’ is selected the book is purchased.

Much of the set-up time was spent in analysing and de-duplicating lists of titles provided by the vendors in their PDA packages. Once checked and finalised the lists were uploaded to the catalogue and made available for selection. The decision was taken not to promote this new service to the library users. Having no previous experience of the model a soft launch was preferred so that items would be discovered as part of the organic search process, staff wanting to limit the possibility of abuse of the new system which could result in a rapid decline in funds.

Once installed the involvement of Subject Librarians with PDA became minimal. The purchase of additional eBooks by traditional ordering methods ran in parallel to the PDA process.

Library Y does still have active PDAs in place but for the purpose of this dissertation only those from 29 May 2015 to 17 August 2017 have been analysed.

1.3. Aim and objectives

1.3.1. Aim

The aim of this study is to determine whether the implementation of Patron Driven Acquisitions at Library Y is considered to be an effective and efficient method of acquiring academic eBooks. This will be achieved by exploring the opinions of selected, relevant members of library staff from Library Y at the University of X.

1.3.2. Objectives

In order to achieve this aim, the following objectives will be met:

- Identify and outline the PDA procedure currently undertaken at Library Y.
- Explore current literature to ascertain existing opinions about Patron Driven Acquisitions in the wider academic community.

- Identify and examine individual staff perspectives (from Library Y) about their experiences of Patron Driven Acquisitions.
- Compare the cost and usage figures of eBooks purchased via a Patron Driven Acquisitions program with eBooks purchased by Subject Librarian recommendation, in order to verify or contradict staff perspectives.
- Provide a critical evaluation of Patron Driven Acquisitions as a method of purchasing eBooks at Library Y.

1.4. Research parameters

This dissertation has taken a case study approach with the practice of PDA at Library Y as the specific focus. It does not seek to represent the thoughts and opinions of all academic library staff.

The study consists of interviews with six key members of the library staff, a comparison of the cost and usage figures of eBooks purchased via the PDA model from 29 May 2015 to 17 August 2017 against those of eBooks purchased by Subject Librarian recommendation from the same time period and a literature review of the most recent research in this field.

It should also be noted that there are several models of PDA provided by many vendors but that this dissertation can only explore the PDAs of eBooks from the two specific vendors used by Library Y.

This has been a particularly timely exercise for Library Y as the decision to further investigate Evidence-based Acquisitions (EBA) has been made and questioning various members of staff about the attitudes towards PDA has inevitably resulted in them analysing their reactions to it in the face of a possible alternative purchasing model.

1.5. Dissertation structure

The following chapter, Literature Review, analyses findings from previous research on PDA including reasons for its emergence and the perceived benefits and challenges it presents, making reference to a small selection of existing studies from other university libraries. An outline of the methodology used follows. The next chapter reports the results from the interviews along with the usage/cost statistics from the relevant time period. Following this is a discussion of the results, comparing them to the findings from the

literature review. The Conclusion chapter assesses whether or not PDA is considered to be an effective and efficient method of acquiring academic eBooks at Library Y.

2. Literature Review

2.1. Introduction

PDA is built on a deceptively simple premise: in a largely digital information environment, it's increasingly possible to let library users find and identify desired documents prior to the library's purchase of them, and for the library to pay only for what its patrons find and actually use.

(Anderson, 2011a)

Anderson's view of PDA is itself rather simple but does summarise the key points very well. This literature review will explore the developments of PDA as well as the experiences of other academic libraries – their reasons for selecting PDA as a purchasing model; their views of implementation; whether it has been considered a success and any concerns that may have emerged. This will be done in order for such issues to be considered in the context of Library Y at the University of X.

Although PDA is still a relatively recent collection development procedure the literature surrounding it suggests that many academic libraries have decided to trial the model, with some studies showing that the success of these trials has encouraged continuation of the practice.

2.2. Traditional collection selection

Academic libraries have traditionally purchased books based on an assessment of quality and suitability for local research and curricular needs. Books were, and still are, bought largely for the potential that they might someday be used.

(Levine-Clark, 2010, p. 201)

This model has always made sense; material must be selected and acquired so that it will be available on the library shelves at the point of need for the user. Books need to be purchased before they go out of print and become difficult and more expensive to obtain. What is not considered here, however, is the emergence of and libraries' transition to eBooks.

Further to this Hodges, Preston and Hamilton (2010) and Fulton (2014) note that the traditional collection development model has long relied on the knowledge and expertise of the librarian for the selection of materials for the academic library. Some consider that collection development has been an "educated guessing game" where users' needs and librarians' choices have not always matched up (De Fino and Lo, 2011, p. 327).

Goedeken and Lawson (2015) explain that during the last quarter of the twentieth century librarians had developed a comprehensive set of guidelines to assist them in the selection and acquisition of materials that would best suit their users' needs. Often referred to as the 'just-in-case' model this approach has its drawbacks. Most notably, in his 1969 article, Trueswell identified that on average only 20% of a typical academic library's collection was regularly borrowed and that this relatively small percentage made up 80% of total borrowing. Kent's study in 1979 also highlighted the fact that users of academic library collections checked out a surprisingly low percentage of largely librarian-selected books (Nixon et al., 2010; Tynan and McCarney, 2014).

These studies suggest that the traditional method of librarian-selected acquisitions does not fully serve users and that alternative purchasing models could be investigated.

2.3. Emergence of PDA

One of the more interesting recent trends in collection development is the growth of PDA. The idea of PDA has evolved over time from the basic policy of accepting user suggestions for purchases through to the models available to libraries today. Shen et al (2011) note that in the early years of PDA, Interlibrary Loan (ILL) was the initiator. Then, it was more about on-demand purchasing – if a user requested an item via ILL and it met certain criteria and was more cost effective to purchase than borrow from a different library, staff would order it. Changes in technology and the transition to eBooks have led to the current models of PDA, whereby a library loads bibliographic records for an agreed collection of eBooks into its catalogue, enabling users to discover the materials and trigger their purchase (Draper, 2013; Goedeken and Lawson, 2015; Sharp and Thompson, 2010).

Johnson (2011) and Devenney (2012) note that PDA is a method of purchasing materials for a library based on known patron demand. Librarians (and in some cases other members of library staff) set the parameters of purchase and the users make the final purchase decision. Devenney (2012) and Dahl (2012) explain that at the initial set-up of a PDA the librarians will decide on which subject areas or classmark ranges they want to be made available, reading level will be determined (this would, more often than not, be set at materials appropriate for a Higher Education readership level for academic libraries) and a maximum cost parameter will be stated. Johnson (2011) stresses that because the librarians have pre-determined these parameters the material selected and purchased by

the users should always be appropriate to the collection. Sharp and Thompson (2010) comment that once the profile is complete the chosen vendor supplies suitable bibliographic (MARC) records for the library to load into its OPAC, these titles become discoverable to the library user and thence become available for them to select. Fulton (2014, p. 2) suggests that “patrons are usually not even aware that they are purchasing the title for the library because the process is seamless on the user side.” This is a bold statement and it would be interesting to investigate whether the users of PDA at Library Y are of the same opinion.

Swords (2011, p. 2) believes that “PDA is the child of research that shows library selectors, dedicated to building timeless and timely collections as they are, cannot predict which books people will use” – it is an answer to the ineffectiveness of the ‘just-in-case’ model. He goes on to suggest that it is also a response to diminished budgets; PDA enables the library to continue to build and develop a relevant and substantial collection despite a restricted budget. Dillon (2011, p. 194) goes as far to say that PDA is “arguably the single best way to leverage the funds that libraries have.”

2.4. PDA – The available literature

Dahl (2012) and Schroeder (2012) note that a large section of the literature on PDA has been written by individuals reporting on the specific practices in their libraries. These authors tend to comment on the initial implementation of the program, the specific parameters put into place and on how they have customised the program to suit their needs (Hodges et al., 2010; Levine-Clark, 2010; Nabe et al., 2011).

Case studies carried out by Egan, Yearwood and Kendrick (2016); Fischer (2012); Stone and Heyhoe-Pullar (2015) and Tynan and McCarney (2014) suggest that the success of a PDA can be measured by identifying the cost per use of each title selected by a user. This, of course, is undeniable. However this researcher believes that more factors should be taken into account. For example, little is mentioned in the literature about staff costs – the amount of time given to consider, set-up and implement a PDA is worthy of consideration and is an area that will be addressed in this dissertation.

Tynan and McCarney (2014) allude to the fact that the majority of the literature surrounding PDA is based on North American findings. Walters’ (2012) analysis of these American studies highlights three main areas of themes:- usage studies, benefits and

drawbacks of the effect on collection development and the lesser researched area of operational issues. However, there appears to be little coverage in the literature of the overall impressions of PDA held by staff who have experienced it. This study will contribute a sample of UK academic library staff opinion.

2.5. Why PDA? The influencing factors

Libraries and the roles of the librarian are constantly changing. Bracke, Hérubel and Ward (2010, pp. 137-138) highlight a ‘kaleidoscope’ of events which contribute to this including

- Changing user needs and expectations.
- Growing user interest in self-service provision.
- Evolving needs for the design and allocation of library space.
- Economic crisis: diminishing budgets, reduced purchasing power, unfilled staff positions.
- New knowledge and skills available to staff.

2.5.1. User needs and expectations

Reiners (2012) states that a common comment from students at Staff Student Liaison Committees and in the National Student Survey (NSS) is that there are not enough books in the library. This definitely reflects the feedback provided to staff members at Library Y and a lot of time and effort is spent in trying to tackle the issue. PDA is one development that has the “capacity to challenge student perceptions about the availability of books in the library.” (Reiners, 2012, p. 34)

2.5.2. User interest in self-service provision

Over recent years Library Y has seen an increase in the number of its services becoming ‘self-service’. Student demand has led to the library being open 24 hours a day for 360 days of the year. However, budget restrictions have limited staff coverage to 9am until 5pm Monday to Friday. In order to continue to meet students’ needs as much as possible in these straitened circumstances the library provides self-issue machines, a book return unit, a laptop cabinet with 48 laptops, an online fines payment service and the ability to self-renew and reserve items without the need for staff. PDA could be viewed as a step further for self-service – it enables students to become involved at a much earlier stage in

their library experience and as Reiners (2012, p. 34) says it gives them “the opportunity to become partners in the collection development process”.

2.5.3. Design and allocation of library space

An academic library is more than just a storage space for books. Students use these buildings as a quiet, comfortable, safe study area and/or as a place for collaborative learning and teaching. Dahl (2012, p. 121) states that

When libraries are defined more as spaces and functions for learning than as warehouses, the floor space and money devoted to collection building must be carefully balanced with the other purposes of libraries as they are coming to be understood in the twenty-first century.

As eBooks need no shelf space the implementation of a PDA can help to alleviate any space issues the library may have.

2.5.4. Economic crisis

Seeger and Allen (2014); Anderson (2011b) and Fisher, Kurt and Gardner (2012) all emphasise the fact that, for most academic libraries, budgets continue to decline and librarians must come up with innovative ways to meet user needs while at the same time conserving resources. The costs of journal subscriptions and full-text databases are constantly rising but they are critical resources for users and must continue to be funded. As far as individual eBook purchases are concerned

PDA enables acquisition at the point a title is needed, rather than buying speculatively and holding in anticipation of use; ‘just-in-time’ access replaces ‘just-in-case’ collecting.

(Lugg, 2011, p. 7)

2.5.5. New knowledge and skills for staff

If the literature is to be believed, after the initial setting up of a PDA, Subject Librarians’ routine involvement in collection development tasks should be minimised and their time made available for other aspects of library life. Bracke, Herubel and Ward (2010, p. 257) suggest that, with this new time “librarians can develop deeper, more meaningful relationships with faculty and instructors as liaisons to academic departments”.

2.6. PDA – The positives

There is a lot of positive literature surrounding the topic of PDA, many authors highlight the benefits to the library and the users when a PDA program has been implemented.

Breitbach and Lambert (2011, p. 17) emphasise the fact that such programs

allow libraries to load ebook records into the local catalog without committing to a purchase. The process significantly increases the amount of locally discoverable content and facilitates access to content at the point of need. In addition, libraries ultimately only purchase ebooks when there is a known demand based on patron activity.

This statement demonstrates how the inclusion of PDA as an acquisitions model can help the library to satisfy users' information needs at a time when budgets are restricted.

Polanka and Delquié (2011) and Downey et al (2014) argue that the most obvious

advantage that PDA offers is immediate electronic access to a large quantity of content.

Schroeder, Wright and Murdoch (2010, p. 193) confirm this belief adding that “with PDA there are no dead ends for patrons seeking information. Purchasing on demand shifts library funds from speculative buying to buying what is wanted and with ebooks there is immediate access for the patron.” It could be said that PDA actually enables the library to offer users a better collection without having to buy all the content outright.

When an eBook collection strategy incorporates an element of PDA, the collection could be viewed as being more up-to-date than one which relies only on deals and negotiations with publishers and vendors. With PDA, as soon as a title is available on the catalogue it is ready to be discovered, selected, purchased and used within a matter of minutes – instant satisfaction for the end-user.

Polanka and Delquié (2011) highlight that a rather obvious benefit of PDA is that each title selected through this purchasing model is guaranteed at least one use and that, because of this, libraries do see at least some return on their investment. Some may argue that the one use is the purchase and does not necessarily mean it has subsequently been read but Stone and Heyhoe-Pullar (2015, p. 30) found that books purchased during a PDA trial at Huddersfield University have become embedded in their collection. He reports that “the 2010 titles have been used consistently since purchase and appear in the top 20 downloads every year.”

2.7. PDA – The concerns

There is a worry that PDA models can change the dynamic of collection development and that they give the user the ability to permanently shape the library's collection as well as the power to make decisions that would traditionally be made by librarians (Medeiros, 2011). However, Schroeder, Wright and Murdoch (2010) explain that librarians will always have a critical role to play in the building and maintenance of a valuable collection. They note that it can only be library staff who can effectively set the parameters for PDAs and that, ultimately, this means that they still have autonomy over the building of a collection. Users may make the decision to purchase a specific title but that title is only discoverable via the PDA because the relevant subject librarian decided it was suitable for the list.

The majority of the literature suggests that PDA programs have been successful and widely accepted among librarians. However, Herrera (2015, p. 5) mentions that the unknown needs of future users and the availability of the materials they may request remain a concern for many librarians if they make the move from a 'just-in-case' to a 'just-in-time' collection building model. Walters (2012, p. 199) agrees and argues that PDA programs "emphasize the immediate delivery of information rather than the development of collections that meet the long-term needs of the institution." He suggests that PDA could even diminish collection quality. This is a statement worthy of investigation during this study and it would be pertinent to explore whether the librarians at Library Y share this view.

Sens and Fonseca (2013, p. 359) worry that libraries have jumped head first into PDA without considering the future implications. They believe that "if academic libraries are not careful, they could fall into the trap of allowing a PDA agreement to (re)create the OPAC as a shopping tool for patrons, and by extension, a marketplace for publishers." They even allude to the 'Amazonification' of the library catalogue. This is unlikely because, as Garofalo (2014) states, PDA models provide Subject Librarians with the ability to create very specific profiles, thus determining which titles are available for selection.

Breitbach and Lambert (2011); De Fino and Lo (2011); Walters (2012) and Downey et al (2014) all point out that even though the vendors supply MARC records for the PDA titles they are not always immediately suitable for the library's catalogue and that they

often need the metadata amending in order to make the material more discoverable to the end-user. They state that the preparation and implementation of a PDA can often be more time-consuming than expected. There does seem to be a gap in the literature regarding whether or not library staff have found there to be more work involved with PDAs than there is with individual, subject librarian selected eBook purchases. It will be useful to explore staff opinion of this during this study.

Walters (2012) states that PDA programs can lead to potential overspending and Polanka and Delquié (2011, p. 128) warn that, if left unmonitored “a patron-driven acquisition model can spiral out-of-control, eating up an entire...budget in a short time.” There is a worry that if the funds are quickly spent there will be no budget available for those users whose needs do not become apparent until later in the academic year. Anderson (2011a) stresses that this can be avoided if libraries make use of the administration tools generally offered by the vendor to track usage activity.

2.8. Existing studies

In recent years many university libraries have published case studies about their implementations of PDA (Breitbach and Lambert, 2011; Fischer et al., 2012; Schroeder, 2012; Tynan and McCarney, 2014; Stone and Heyhoe-Pullar, 2015; Egan et al., 2016). The majority of these studies tend to be favourable and highlight that items purchased by PDA are usually more cost effective than those selected and purchased by librarians because they generally have higher circulation. Schroeder (2012) states that the results at Brigham Young University (BYU) were striking. They found that items purchased via their eBook PDA were 26% cheaper than the ones obtained through the traditional purchasing model and were used 13.75 times more. Devenney (2012) notes that statistics from the University of Huddersfield eBook PDA from 2011 also support the findings from BYU. She states that PDA titles had double the usage of a non-PDA title. Although cost per use statistics are valuable for measuring the performance and success of PDAs, they are not the only indicators to determine whether they are effective purchasing tools but the literature seems to give little attention to this. This dissertation will investigate what other factors library staff consider when coming to a decision as to whether PDA is an efficient model of acquisition or not. For example, are PDAs suitable for every subject area; what other costs should be taken into account (such as the amount of staff time

involved in setting up the program) and what are staffs' overall opinions of PDA as a purchasing model?

De Fino and Lo (2011, p. 330) believe "there is some unwillingness among collection development librarians to relinquish the role of selection." There is a worry that titles selected by users themselves will not support the research and curriculum of the university. However, during their study, Shen et al (2011, pp. 212-213) found that researchers were often surprised by the titles selected by the users. Their initial fears that user selections would not be as sophisticated as librarian selections were allayed when a comparison of the numbers demonstrated that "librarian and patron selections overall were remarkably similar in their content levels."

Most of the libraries from these studies agree with Egan, Yearwood and Kendrick (2016, p. 142) in that

We're of the opinion that PDA is an effective collection development tool when used with other, more traditional practices. Active selection by our patrons, coupled with continued oversight by professionally trained librarians, is a model worthy of time and consideration.

2.9. Conclusion

A combination of factors has led to PDA becoming a viable purchasing option for academic libraries. Much of the literature suggests that it is a valuable addition to traditional acquisitions processes. However, there appears to be a gap in the literature regarding attitudes of library staff about the full implications of introducing PDA.

Levine-Clark (2011) notes that, for most libraries, the implementation of PDA has been an add-on to standard collection building practices. He believes that PDA can become the primary means for a library to purchase materials and build collections. This dissertation will explore whether library staff at a particular Northern English university are of the same opinion as Levine-Clark after experiencing the impact of PDA over two years. Ultimately this study should ascertain whether or not participating staff believe PDA to be a worthwhile process.

The following chapter, Methodology, outlines the research methods used.

3. Methodology

3.1. Research approach and methods

This dissertation adopts a case study approach for its investigation of staff perspectives of PDA at Library Y. Stake (1995); Payne and Payne (2004) and Bryman (2016) state that case studies involve the detailed and intensive analysis of a single case. Denscombe (2014, p. 54) emphasises that

case studies focus on one (or just a few) instances of a particular phenomenon with a view to providing an in-depth account of events, relationships, experiences or processes occurring in that particular instance.

This approach is suitable for this study, which investigates the use of PDA at a specific academic library.

Bryman (2016, pp. 60-61) notes that there is a tendency to associate case studies exclusively with qualitative research but that this is inappropriate. He acknowledges that many case studies do seem to use qualitative methods such as observations and interviews as their data collection techniques because “these methods are viewed as conducive to the generation of an intensive, detailed examination of a case.” However, he also suggests that it is not uncommon to see the application of both qualitative and quantitative research data collection methods in one study. This mixed methods approach has been adopted for this study as it provides the opportunity to compare the subjective views of staff involved with PDA with the objective reality of the statistical data. Johnson and Onwuegbuzie (2004, p. 14) suggest that incorporating both qualitative and quantitative approaches to research methods has been found “to frequently result(s) in superior research (compared to monomethod research).” The following data collection methods were used

- Literature review
- Interviews
- Collection and analysis of cost and usage data

3.1.1. Triangulation

A further reason for selecting a mixed methods approach is that it aids triangulation, the purpose of which is to cross-check and validate findings (Pickard, 2007; Flick, 2014; Yin, 2016). This assists in creating more confidence in the accuracy and reliability of the information gathered. Laws (2013, p. 143) highlights that “the key to triangulation is to

see the same thing from different perspectives and thus to be able to confirm or challenge the findings of one method with those of another.”

3.2. Justification for research methods

3.2.1. Literature review

Literature reviews provide an overview of existing data and current themes and highlight any gaps in the previous research. As Pickard (2007, p. 25) states they “form the theoretical framework for your own empirical investigation.” For this reason the first stage of the methodology was to conduct a literature review.

3.2.1.1. Literature search strategy

In order to gain an overview of what had already been published about Patron Driven Acquisitions in academic libraries the keywords ‘Patron Driven Acquisitions’ and ‘PDA’, along with the terms ‘academic librar*’ and ‘university librar*’ were the initial search terms used but it quickly became apparent that the addition of ‘Demand Driven Acquisitions’; ‘DDA’ and ‘Patron-initiated purchasing’ would produce more (but still relevant) results. (Jones (2011) notes that the term ‘PDA’ also refers to ‘personal digital assistant’ and ‘public display of affection’ and that this had led to a renaming of the service in their library. In light of this there was a worry that many inappropriate, irrelevant search results would be produced but this was not the case.)

As PDA is a relatively recent development the literature search was not limited to a specific date range. Subsequent evaluation of the materials about PDA used throughout this study has revealed that all of them were published in or after 2010.

Various search tools were used to find the relevant literature; the OPAC and discovery tool – Summon - at the researcher’s place of work; the Library, Information, Science and Technology Abstracts (LISTA); Library and Information Science Abstracts (LISA) and ScienceDirect databases.

3.2.2. Qualitative methods

The methodology is primarily qualitative based on six semi-structured interviews with key members of staff who have been involved, at various points, with the implementation and use of PDA at Library Y. Perakyla and Ruusuvuori (2011, p. 529) state that “by using

interviews, the researcher can reach areas of reality that would otherwise remain inaccessible, such as people's subjective experiences and attitudes."

3.2.3. Quantitative methods

The decision to include a comparison of the usage and cost figures for eBooks bought via PDA against eBooks selected and purchased by the Subject Librarians was made as it was hoped that they would confirm or contradict what the interviewees' views and opinions were and, as Denscombe (2014, p. 147) highlights, the use of both qualitative and quantitative methods can increase confidence in and validity of the findings.

3.2.4. Other methods considered

Online questionnaires were considered for the research but a number of factors led to them being dismissed as an information gathering method in this particular study. One reason was the restriction of time. The design and creation of the questionnaire itself would not be overly time-consuming; however, waiting for the responses once they had been distributed would be out of the researcher's control, unlike interviews. One reason for considering the use of questionnaires is that they often include questions that can incorporate a Likert scale. Bell (2014, p. 163) notes that these scales are used "to discover strength of feeling or attitude towards a given statement or a series of statements." This could be a very useful tool for exploring impressions held but it was decided that an interview process may provide more in-depth insight as verbal responses tend to be more revealing.

3.3. Ethical considerations

This study was carried out in accordance with the Aberystwyth University DIS Ethics Policy. This ensured that, at every stage, the research conducted was ethically sound.

Flick (2014, p. 50) emphasises the importance of research being based on informed consent. This means that all participants must willingly agree to partake in the study on the basis that they have understood the information provided to them by the researcher. In order to achieve this an 'information email' was sent out to all potential interviewees (Appendix A). The email stated the purpose of the research, explained what would happen with the data gathered and stressed anonymity and confidentiality. Before each interview participants signed consent forms (Appendix B).

A decision was made at the very early stages of the research to anonymise all names throughout the entire process. Therefore, the name of the University, the Library, the staff involved and the eBook /PDA vendors have been kept confidential. This is because it was felt that interviewees would be more likely to offer open, honest and truthful views and opinions about their experiences of PDA if neither they nor the vendors could be identified. In the case of the vendors, it was deemed appropriate as commercial confidentiality should be upheld: unfair criticism of any vendor must be avoided.

3.4. Data collection

3.4.1. Semi-structured interviews

Semi-structured interviews were chosen as the main research method because they are “based on a small number of open-ended questions, the answers to which are actively and freely probed by the interviewer for elaboration” (Payne and Payne, 2004, p. 131). This approach was deemed more appropriate than a structured interview format which, as Denscombe (2014) notes, involves tight control over the format of the interview process and requires the participant to offer limited-option responses. It was considered important to have a clear list of questions to structure the flow of the conversation. However, as the purpose of the interviews was to gain an understanding of what staff at Library Y think about PDA it was necessary to allow flexibility for them to add their own comments. Bell (2014) and Denscombe (2014) emphasise that unstructured interviews, although they allow the interviewees to develop their own ideas and follow their own train of thought, can be difficult for the interviewer to control and often take a lot of time to analyse. For these reasons the semi-structured interview approach was selected.

Interviews were preferred to questionnaires because, as Neuman (2003) identifies, face-to-face interviews have the highest response rate and also enable the interviewer to observe non-verbal communication and visual aids.

There are some disadvantages to using interviews as the primary method of data collection. Bell (2014) suggests that, like questionnaires, they can be time-consuming, especially the transcription that is required after the interviews have occurred. This was taken into consideration before the study began and time was allocated for the transcription process. The interviews themselves were relatively straightforward to organise. All interviewees worked in the same place and dates and times were easily

arranged. Oppenheim (2000, pp. 96-97) highlights another disadvantage of interviews - the risk of bias. He identifies many potential causes of this including 'careless prompting'; 'poor maintenance of rapport' and 'biased probes.' Awareness of these issues throughout the process aimed to minimise the possibility of bias.

3.4.1.1. Sampling

A purposive sampling approach was used to determine who to interview. Bryman (2016, p. 408) states that the aim of purposive sampling is to "sample cases/participants in a strategic way, so that those sampled are relevant to the research questions that are posed." The interviewees selected were those members of staff from Library Y who had had some involvement with the PDA process. Not all Subject Librarians had implemented PDAs and so a very specific group of people had to be selected.

3.4.1.2. Piloting

Denscombe (2014) and Bryman (2016) suggest that it is good practice to conduct a pilot study as this can identify any issues with the questions or the way the structure works. A pilot interview was carried out with the Acquisitions Manager of Library Y. This was a member of staff who had been heavily involved with the implementation of PDA but who would be retiring before the research study would be complete and so could not participate in the formal interview proceedings. Feedback from this pilot interview suggested that two interview schedules should be used rather than the one that had been tested. It was felt that some of the questions were relevant to some staff members but not to others and vice versa. This advice was acted upon and two versions of the schedule were produced. (Appendix C and Appendix D).

3.4.2. Cost and usage statistics

The analysis of the cost and usage data for PDA purchased eBooks and Subject Librarian selected (also referred to as Firm Order) eBooks was undertaken in order to attempt to confirm or contradict what staffs' perceptions were of the cost effectiveness and overall value of PDA. Comparing the statistics with the findings from the interviews would determine whether staff opinions were corroborated by the facts or were based on preconceived ideas.

3.5. The interviews

The one-to-one interviews were relatively easy to arrange around the participants' work commitments and took place over a period of four weeks. Two of the interviews were conducted in participants' offices and four were held, on separate occasions, in a private meeting room. All interviewees had willingly agreed to the audio recording of the interviews and had been made aware that these recordings would be transcribed, anonymised and stored securely for the duration of the study. A summary of the interviews and the interviewees is presented in Table 3 below

	Job Role	Identifier	Date of Interview	Length of Interview
Interview 1	Electronic Resources Librarian	A	25/07/2017	17 min 58 sec
Interview 2	Subject Librarian – Life Sciences	B	26/07/2017	30 min 43 sec
Interview 3	Chief Library Assistant (Acquisitions)	C	26/07/2017	42 min 01 sec
Interview 4	Subject Librarian – Life Sciences	D	3/08/2017	19 min 49 sec
Interview 5	Subject Librarian – Management and Law	E	10/08/2017	40 min 26 sec
Interview 6	Subject Librarian – Social Sciences	F	21/08/2017	44 min 49 sec

Table 3 - Interview timetable

The interviews consisted of ten questions for the Electronic Resources Librarian and Chief Library Assistant (Acquisitions) and fourteen questions for the Subject Librarians. The questions were designed to make each member of staff reflect on their experiences with PDAs and think about attitudes towards it.

The main aim of the interview with the Electronic Resources Librarian and the Chief Library Assistant (Acquisitions) was to establish whether or not they believe that PDAs are a preferable purchasing model to the Subject Librarian selected eBook purchasing

model in terms of the amount of work and time that needs to go into their implementation. The questions were designed to explore a number of themes. They would

- ascertain the background and level of involvement in PDA of the individual so that subsequent answers could be put into context
- determine whether staff believe that PDAs take up more or less time than eBooks purchased by Subject Librarian recommendation
- explore whether PDA is believed to be a cost effective model for purchasing
- find out what staff perceive to be the advantages and disadvantages of using a PDA model so that these could be compared with the findings from the literature review
- determine whether staff believe that PDA works effectively in Library Y and if they would be likely to recommend the model to other academic libraries.

The interview schedule for the Subject Librarians included all but one of the same questions as the schedule for the Electronic Resources Librarian and the Chief Library Assistant (Acquisitions). A question specifically about the administration of PDAs was omitted as it was deemed inappropriate for this group. All other questions remained the same to allow the key issues to be addressed by both groups of staff. Five additional questions were included. These were designed to

- encourage the Subject Librarians to think about PDAs in the context of their particular subject areas
- determine the motives behind the implementation of PDAs in these subject areas
- investigate what they think about student reaction to PDA.

The interviewees were not shown the schedules in advance as it was felt that spontaneous reactions and answers would provide a more truthful insight into their thoughts and opinions on the topics included.

Once the interviews had been transcribed they were analysed using open coding and key themes were identified. Throughout this process a conscious effort was made to consider points highlighted in current literature in order to relate them to findings from the interviews. The transcription process enabled continuous identification of recurrent key terms and phrases.

3.5.1. Problems with the interviews

The main problem during this process was the amount of time taken up by transcription of the interviews. Bell (2014, p. 184) states that “you can count on at least 4-5 hours’ work for every hour of interview even if you are skilful and quick on the keyboard”. This was certainly the case and even though time had been allocated for the process it did delay analysis of the results.

3.6. The cost and usage statistics

The cost and usage data was collected for both PDA purchased eBooks and Subject Librarian selected eBooks. Data from 29 May 2015 to 17 August 2017 for both Vendor 1 and Vendor 2 was analysed and these findings are presented in the following chapter: Results.

Library Y purchases Subject Librarian selected (firm order) eBooks from a number of additional vendors, some of which do also provide PDA services. However, the decision to only use Vendor 1 and Vendor 2 for PDA was agreed from the outset by all participating staff and so the cost and usage data pertaining to Subject Librarian selected eBook purchases from vendors whose PDA services are not used at Library Y have been excluded from this study in order for a fair comparison of PDA against Subject Librarian selected eBook purchases.

The following chapter, Results, includes the findings from the interviews and the analysis of the cost and usage data. This information is presented by the use of tables, charts and extracts from the interviews conducted.

4. Results

4.1. Presentation of the results

Pickard (2007, p. 245) notes that results from qualitative analysis are usually presented as a narrative and as this study was primarily qualitative this is the case here.

The open coding of each of the six interview transcripts highlighted six key themes (Appendix E) and the narrative is presented under these resulting headings. Selected quotes from the interviews have been included and these can be identified by the use of italics. The findings from the study of the cost and usage figures for eBooks purchased by PDA from both vendors and those for the eBooks selected and purchased by the Subject Librarians are presented by the use of charts and tables. Where applicable, these graphs are discussed under the relevant themes.

4.2. Perceived benefits of PDA

One of the major benefits of PDA, cited by all of the interviewees, is that it provides access to the user instantly at the point of need. One interviewee, when asked specifically about the benefits of PDA, commented on this and compared the speed of a PDA purchase to the long process of buying a Subject Librarian selected eBook

It's providing access at the point of need, and the immediacy of PDA is a big benefit. The speed at which people can get access to something rather than going down the route of someone making decision, passing the order details on to a library assistant, for then that to be ordered, an order created, sent to the supplier, supplier sending it back, us waiting for the MARC records etc, erm, so the speed at which it's done is a big positive.

(Interviewee C)

This response is in line with how the literature refers to PDA as being a 'just-in-time' model – providing the user with what they want, when they want it rather than buying the material 'just-in-case' someone might find it useful at some point in the future.

Five out of six of the interviewees mentioned that PDA is a very effective model for satisfying gaps in the library collection. One member of staff believes that it is also a great tool for expanding a collection

I suppose my feeling about PDA...is what it's doing is bulking out our coverage. We haven't got the time to develop the kind of levels of collection

depth and breadth we would like, we don't have the money to do it... PDA I think is potentially a way of doing that.

(Interviewee F)

Three interviewees commented that PDA is particularly useful for students undertaking a Masters dissertation or research project, both of whom have very specific needs

With the best will in the world we can't read people's minds or forecast exactly what projects people will do and where their interests might lie.

(Interviewee A)

Library Y has an order embargo period between the end of May and the beginning of August which means that the Subject Librarians cannot order any materials during this time. Interviewee B finds that PDA is an excellent way to satisfy the needs of the Masters students (who are usually beginning their projects during this period) and the academics who may be conducting their own research during the summer break. The funds for the PDAs have already been deposited into the vendor accounts earlier in the financial year so the order embargo is not being broken

I really did appreciate the being able to address that gap for the Masters students... and not just Masters students; it's the time when academics have their most chance to do research and... they said 'oh, there's this book and I've got time to read it' 'Yeah, but I can't buy it for you til August.' So it was really good to be able to do something about that.

(Interviewee B)

One further benefit that two of the interviewees commented on is that PDA allows the users to make some of the decisions about what materials to include in the library's collection. One interviewee suggests that PDA enables students to

Potentially pick up on things which, er, we were making available, things which we never would have considered of buying and is very good material and is bang on what they want!

(Interviewee F)

Interviewee C believes that PDA is

Focussed on individual needs and so it might be something that we think is completely irrelevant but someone has searched for it and found it and they've used it – so it's driven by demand.

These last two points demonstrate that PDA can, potentially, positively impact on satisfaction surveys as the library can be seen to be consciously making the effort to give the user what he/she wants when he/she needs it.

4.3. Perceived problems with PDA

One of the most prominent themes to emerge from the transcripts (and one that was covered extensively by all interview participants) was the very lengthy and convoluted set-up process for both of the PDAs. Five out of the six interviewees felt strongly that the initial set up was very time-consuming and unexpectedly problematic. One major area of concern was that the vendors were not supplying suitable lists of material to be included in the catalogue for purchase by PDA. Interviewee C explained that once the decision has been made to implement a PDA plan with a specific vendor the library provides the vendor with a full list of ISBNs so that checks can be made to ensure that material already in the library's collection will not be included in the PDA list. The library also specifies the classmark ranges that should be used as well as other parameters that should be adhered to in order to generate a list of suitable titles. The interviews revealed that both Vendor 1 and Vendor 2 failed to do this which resulted in a lot of unexpected work for the library staff involved

We get lists back [and] there are still issues of duplication of titles within their own lists. We've had titles where they've been outside the classmark ranges that have been specified, outside the price ranges that have been specified and there's been older editions included in the lists. We've been told they can't eliminate them so they basically just send a list of all things within that range and so, for that reason, we've thought that it's better to do a lot of things internally.

(Interviewee C)

One of the parameters set by the library is the readership level of the material to be included. Library Y requested that this be set at Higher Education. The lists provided by both vendors contained some titles that staff did not consider to fit the criteria and this resulted in a differing of opinions about what to do. Interviewee B said that upon noticing the inclusion of irrelevant material she spent hours trying to eliminate it from the lists as she believes that the displaying the titles in the catalogue legitimises them and she would prefer it if the user did not have the option to select such items

We actually say to our students, at induction, 'use the catalogue rather than Google because it's quality resources.' So, if we go sticking 'Flirting for Dummies' on our catalogue we're basically saying 'that's something you're allowed to use' ... and they're not!

Conversely, Interviewee E took a different approach to the issue. She believes that users make sensible decisions about the materials they select and so she trusts that they would not select unsuitable material

Where a book says that it's an A-Level textbook I tend to think 'what's the point pulling that one out' because... people aren't going to use it because they can see it's an A-Level text.

She goes on to say that

I'm hopeful that my users are going to make sensible selections and that's the point of PDA. The point is we're giving the patrons the chance to make the decision.

(Interviewee E)

Giving the users the opportunity to make the decisions about what goes in to stock is one of the most fundamental points to PDA. However, two of the interviewees voiced their concerns about users sometimes making inappropriate decisions, especially if unsuitable titles have been missed during the initial set up. One Subject Librarian stated that

I think it does give opportunities for students to get hold of material that I don't think is necessarily right for them.

(Interviewee F)

A further concern for both the Management and Law Librarian and one of the Life Sciences Librarians was that not all material required for their specific subjects is included in PDAs

It's only mainstream publishers really whose content ends up in PDA so you're missing out small and independent publishers and so you are missing out some content. If you don't have a stream to include that in your collection development you're missing out on a load of material that a library has a duty to collect in some ways.

(Interviewee E)

I think science textbooks are the cash cows of publishers these days... and they're very very loathe to change their business model at the moment cos it is

the guaranteed money spinner... anything that's good does not tend to turn up in PDAs.

(Interviewee D)

Both of these interviewees felt that, because of these issues, PDA could not be a stand-alone purchasing model for eBooks at Library Y and could not ever be the only method used for collection development.

Interviewee E referred to PDA as being *kind of smoke and mirrors*. She went on to explain that because of the technicalities of the model one day users may find a particular title on the catalogue and make a note to come back to it and access it in the future. However, if the PDA has come to an end, the unused titles are suppressed from the users and are therefore no longer available to purchase. This had caused problems for some members of academic staff who had found titles on the catalogue that they found suitable to add to reading lists but did not purchase at the time

People have put things on reading lists cos they've found them in the PDA; they haven't then gone in to read them and then you discover that the record's been suppressed and they say 'you know, we thought that it was something that was here within our collections'.

(Interviewee E)

The Chief Library Assistant (Acquisitions) felt that one disadvantage of PDA is that the budget must be monitored in order to make sure that it does not become overdrawn. Again, this was not a problem specific to one vendor but had been Library Y's experience with PDAs as a whole

Our suppliers struggle on occasion trying to keep a tally of how much is actually... being spent and as a result there are problems relating to spending which can be attributed to PDA which you don't get with individual purchases.

(Interviewee C)

4.4. PDA and Subject Librarians

One of the main concerns, highlighted by the majority of the Subject Librarians, was that the money allocated to the PDAs might not be spent 'sensibly' by the users. One member of staff felt so strongly about this that she spent a lot of time reading through the lists of potential materials and removing items that she found to be duplicates, earlier editions or

were just not suitable. When asked about the initial set up procedure and its drawbacks Interviewee B commented that

We could have just let the whole thing loose into the wild but it would've broken my heart... it's a lot of money and if it had gone entirely on, you know, fifteen copies of the same thing I would've been really cross.

At a time when library budgets are ever decreasing, materials are more and more electronic and the learning environments are becoming more virtual – the role of the Subject Librarian is often questioned. The emergence of purchasing models such as PDA contribute to the argument that maybe these staff roles are no longer needed and Subject Librarians could be forgiven for taking a sceptical view of them. The majority of the Subject Librarians questioned at Library Y believe that giving the user the ability to select their own materials for the library is a positive step forward but do still think that their roles will remain necessary now and in the future. One interviewee admitted

I do have some librarian arrogance and I do think that we make really good purchasing decisions and I'm not gonna say 'wise librarians know best' and I know that there is a school of thought ... that goes 'why do librarians know best: the students know what they want to read' but I think actually that we do know what kinds of things are gonna get read, we do understand our subject areas, we do develop that subject knowledge and that's all really valuable.

(Interviewee E)

Another interviewee conceded that maybe she should trust the users more and let them use their own judgement to decide what they should and should not be using for their studies. However, her librarian's nature does not allow her to fully give in

Maybe I should say 'you know, so what if they do buy 'Flirting for Dummies' why should it bother me?' ... it just does bother me... deeply.

(Interviewee B)

There was a consensus amongst the Subject Librarians that PDAs are suitable for some subject areas but not all and that where they work particularly well is for dissertations or other individual projects where the projects cannot be predicted

At research level... there's incredible breadth and range of interests... it makes it exceptionally difficult to cover that through normal purchasing... and so it is helpful to have that spread [with PDA]

(Interviewee F)

However, in response to the question ‘is PDA the future of collection development?’ the same interviewee stated that, although aware of other academic libraries going down that route, he felt that Library Y should not follow suit and that if it did

Something is going to be lost there because I don't think that the content matches the requirements of our staff and students, particularly in my area with Peace Studies, where they require such obscure and bizarre things sometimes.

(Interviewee F)

These opinions from this interviewee reflect more ambivalence about PDA than from other members of staff.

One point that three of the Subject Librarians stressed during their interviews was that they could not envisage a library without print books and that, in fact, users would not want an eBooks only service

We know that students actually still, in the main, prefer print books if they're physically studying with us.

(Interviewee E)

Students want physical books; they don't just want eBooks.

(Interviewee F)

[commenting on libraries that have moved to PDA only]

What do their readers think of their eBooks because our readers don't think much!

(Interviewee D)

It is obvious from these comments that the majority of the Subject Librarians at Library Y do not see a move towards PDA, eBook only collection development any time in the near future.

4.5. PDA and academic library users

The Subject Librarians were asked whether they had made users aware of the implementation of the PDAs and/or if they had explained what they were. The response from all four of these interviewees was that they had not because they had been told not to. A conscious decision had been taken by senior staff members to adopt a soft launch

approach for the whole process and so advertisement of the service was discouraged. Two out of the four Subject Librarians felt that this was a mistake and that, actually, it would have been helpful for the users if the library had promoted it and/or explained what it was

I got people saying... 'we went to the preview and then it said "do you want to buy it" and I didn't want to take money from you'... I actually think if we had been allowed to promote it as what it was and given instructions as to what to do, it would have worked better.

(Interviewee B)

Asked whether they thought the library users had noticed the inclusion of the PDAs, three out of the four Subject Librarians answered that they did not think they had

No, because there's so much in there [the catalogue], especially if they're using the discovery tool. They have no real concept of how much stuff there is... it's invisible.

(Interviewee B)

One interviewee said that, in his experience, users had noticed it only if they came across a problem such as finding a title on the catalogue one day (but not going through the entire PDA process and purchasing it) only to go back to look for it again at a later date for it to no longer be there

That's one particular area where people noticed something was happening and we had to explain what was going on.

(Interviewee F)

The fact that the library users did not have knowledge of the PDA service makes it impossible to know whether the introduction has been a success with them. However, one of the Subject Librarians noted during the interview that the student satisfaction score for the library had gone up since the introduction of the PDAs and although this could not definitively be attributed to them, staff would like to think that the PDAs did contribute to the increase in the score.

4.6. The cost-effectiveness of PDA

All of the interviewees were asked whether they considered PDA to be a cost-effective acquisitions model. One Subject Librarian admitted that she did not really have a strong

opinion either way as she had not been involved in any analysis and had not really thought about it. She did stress that she thought that it was a much more time-effective means of acquisition for the users and that this was a very positive aspect of PDA.

The remaining five interviewees had various opinions about the cost-effectiveness of the model. Two highlighted the importance of taking hidden costs into consideration with the main factor here being staff time. One interviewee makes the point that although PDA takes a lot of staff time in the initial set up process, the cost per use for items purchased via PDA is likely to be lower overall as titles selected by users themselves should potentially have more use. She believes that

The balance goes from resource-heavy, cost-heavy on resource for PDAs at the start to cost per use being very low year on year.

(Interviewee A)

The Chief Library Assistant (Acquisitions) was of the opinion that it is actually quite difficult to say whether PDA is more cost-effective than Subject Librarian selected eBook orders if staff time and expense is to be included in the calculations. He came to the conclusion that because of the processes and procedures that are followed for ordering Subject Librarian selected eBooks that these would be more cost-effective than those purchased via PDA

In terms of the price that you're paying I think that you're more likely to get a better deal from individual purchases because it's checked at the point of ordering.

(Interviewee C)

Conversely, Interviewee F (a Subject Librarian) suggested that individual purchasing is actually more expensive proportionate to the amount of use the material will get

With PDA you're always bargaining you're getting more content for a lower overall price and that includes staff time and all those other factors as well... because students are making those choices about what is used, it will be more cost-effective in that the material is used more.

(Interviewee F)

The difference in opinion here is interesting: - as Interviewee F does not have experience of the time taken by initial set up (unlike Interviewee C) his views on the cost-effectiveness of PDA could be considered to be unbalanced.

4.6.1. The cost and usage statistics

At this early stage of this section it is important to note that the data used for this analysis only focussed on the eBooks purchased via PDA and those eBooks selected by Subject Librarians and purchased from the same two vendors: Vendor 1 and Vendor 2. Library Y does also acquire individual eBooks and subscription packages from other vendors but these have not been included in this study.

Table 4 combines the results from both vendors and is therefore a comparison directly between PDA purchased eBooks and Subject Librarian selected eBooks.

Type of eBook	Number of eBooks	Total Amount Paid	Total Number of Uses	Cost Per Use	Cost Per eBook
PDA	1,170	£107,090.38	15,841	£6.76	£91.53
Subject Librarian Selected	373	£34,800.21	5,191	£6.70	£93.30
Total	1,543	£141,890.59	21,032	£6.75	£91.96

Table 4 - Total cost summary

This data shows that, overall, PDA eBooks accounted for 76% of the total eBook purchases from both Vendor 1 and Vendor 2 between 29 May 2015 and 17 August 2017. They also accounted for 75% of the total eBook cost during this same period.

Chart 1 (below) shows that all of the PDA eBooks purchased from Vendor 1 were used at least once and that the majority of them were accessed between 2 and 10 times. 97 of the titles were only used once and 6 of them were used over 100 times.

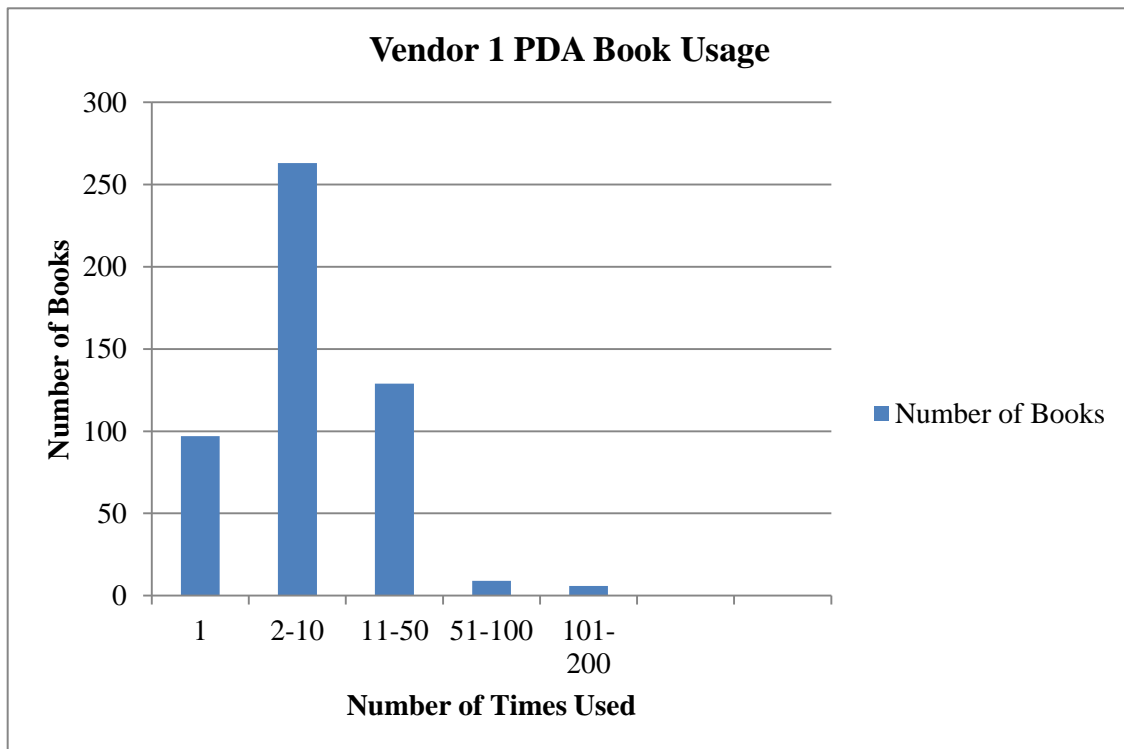


Figure 1 - Vendor 1 PDA eBook usage

Chart 2, on the following page, shows that the Subject Librarian selected eBooks purchased from Vendor 1 did not have a similar rate of usage. Over 140 of the 263 titles bought were never used. 62 of the titles purchased were accessed between 2 and 10 times and only 2 were used over 100 times.

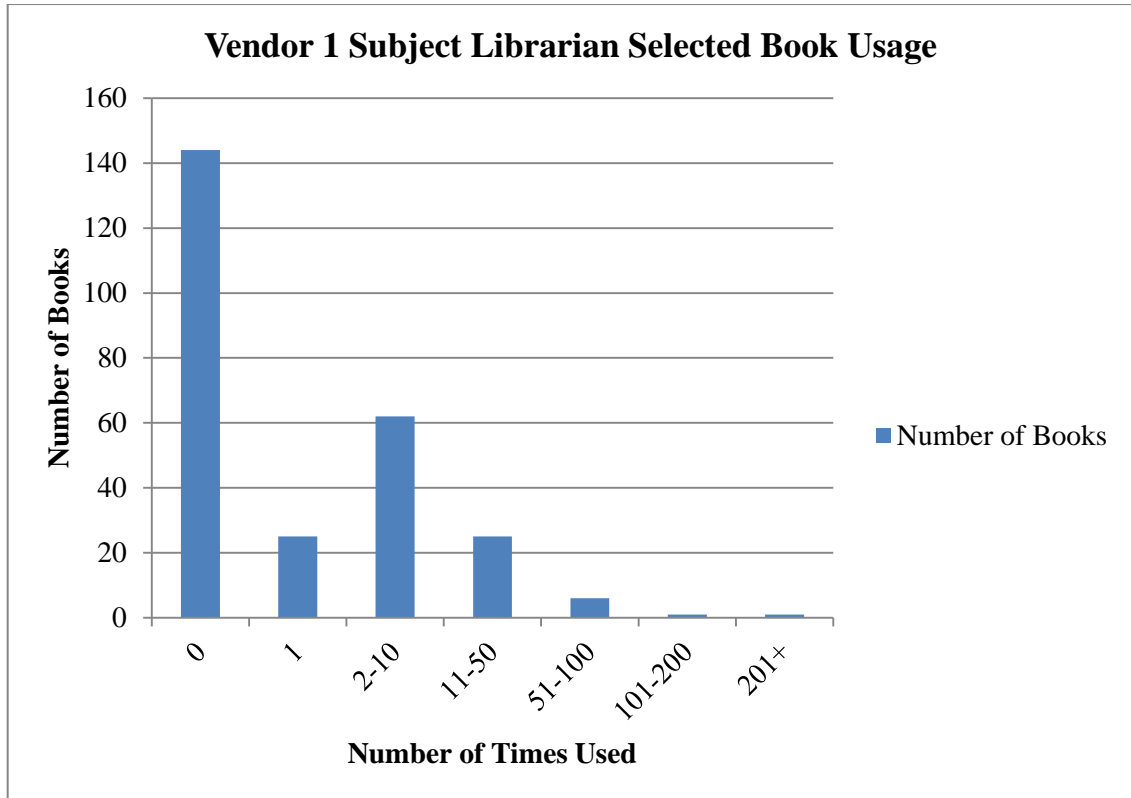


Figure 2 - Vendor 1 Subject Librarian selected eBook usage

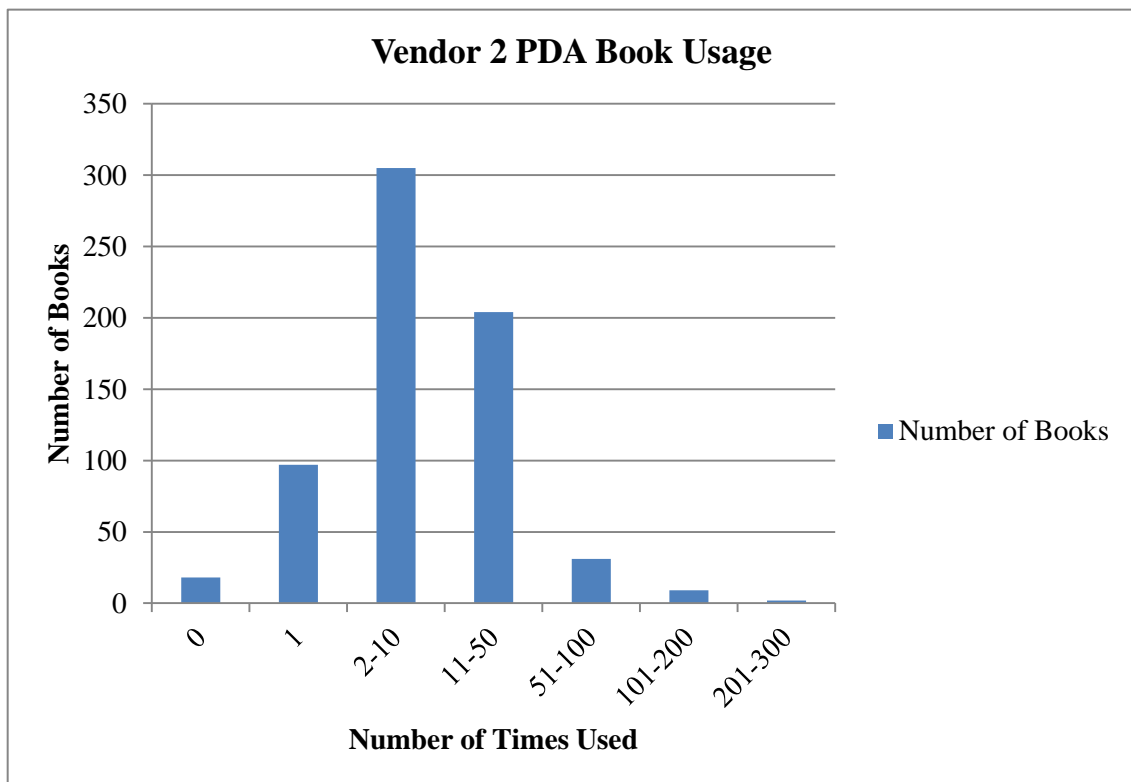


Figure 3 - Vendor 2 PDA eBook usage

The figures for Vendor 2 were quite similar.

Again, with the PDA titles (displayed in Chart 3 above) the majority were used between 2 and 10 times, 97 of them were only used once and 11 were used more than 100 times.

One significant difference with these usage statistics was that the results suggested that 18 PDA titles had never been used. This was queried with the Chief Library Assistant (Acquisitions) because the whole premise of PDA is that a title can only be purchased if it has been accessed at least once with the user then confirming that the acquisition should go ahead. There should not be a zero usage result for a PDA purchased title. This discovery has since been reported to Vendor 2 and will be investigated by them for Library Y.

Similarly to Vendor 1, Chart 4, below, demonstrates that the Subject Librarian selected eBooks purchased from Vendor 2 did not have as much use as the PDA titles: almost a third of the eBooks purchased via this method were never used but 6 of them were accessed over 200 times.

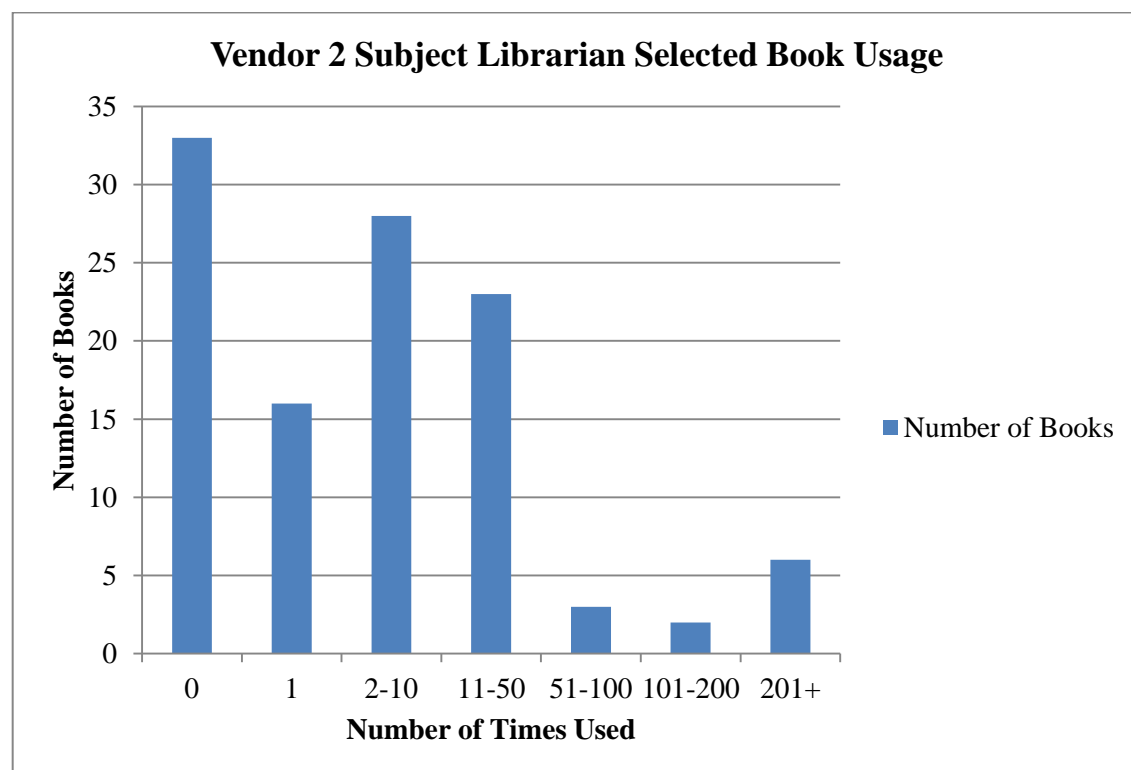


Figure 4 - Vendor 2 Subject Librarian selected eBook usage

Overall, the data shows that the PDA purchased eBooks were the most utilised during the period of analysis with 75% of the total number of uses compared to only 25% for the Subject Librarian selected eBooks.

When looking at cost per use, there is actually little difference between PDA and Subject Librarian selected eBooks with the cost per use for the latter only being 1% lower than for PDA. It must be noted, as some of the interviewees said, that these figures do not take into account the significant time invested by those staff involved in the implementation of the PDAs and that this should be considered when analysing the cost-effectiveness of the model. (With more time and information staff costs could be analysed and incorporated into the data, however, it was beyond the scope of this study.) However, as Table 4 shows, although much more of the budget has been spent on PDA and the titles do not work out to be much cheaper, it must be recognised that they expand the catalogue significantly and, if PDA items are purchased, they are available for immediate access – a massive benefit to users.

4.7. PDA – would staff recommend it?

When asked whether they would recommend PDA as a method of purchasing eBooks to other academic libraries two of the interviewees did not hesitate to say that yes they would. One member of staff said

I personally think that it's one of the models which we can effectively use to try and satisfy gaps within the content we've already got within the library.

(Interviewee C)

Three of the interviewees were a little less enthusiastic. They did say they would definitely recommend the model but would suggest that staff at these libraries would need to do quite a bit of monitoring and evaluation during the implementation of the PDA and once it had been set up. One interviewee said

I'd make sure they understand the timescales and the issues involved to set it up or get going with one... but I wouldn't not recommend it.

(Interviewee A)

One of the Subject Librarians said that she would recommend PDA

If you were trying to build a particular area, especially when there isn't any subject knowledge specific to that.

(Interviewee B)

Only one interviewee has reservations about recommending PDA to other academic libraries because, in his opinion, the PDA experience at Library Y did not come up to expectations. He had believed that the benefit of PDA is that once the money has been deposited with the vendor, the parameters set and suitable lists incorporated into the catalogue, the service should run itself. However, at Library Y staff had to spend so much time rectifying the mistakes made by the vendors during implementation and after that the service seemed less beneficial and therefore he would be less likely to want to be involved in further PDAs

I think I wouldn't use the word 'recommend'. I think I would say it's something they should consider seriously and they should look at it and think about what they want to get out of it... so recommend – no, I think offer advice – yes.

(Interviewee F)

The following chapter, Discussion, examines the key findings from the results of the interviews and from the study of the cost and usage figures. It then relates these to the literature.

5. Discussion

The purpose of this study was to explore the opinions of relevant members of staff from Library Y about whether or not they consider PDA to be an effective and efficient method of acquiring academic eBooks.

The interviews provided an insight into the personal perceptions of six individual, key members of staff who had been involved, at some point, with two PDA plans between May 2015 and August 2017. The decision to speak to four Subject Librarians, the Electronic Resources Librarian and the Chief Library Assistant (Acquisitions) was taken in order to compare a range of staff attitudes and opinions. The analysis of the cost and usage data taken from this same period was undertaken in order to provide factual data to either confirm or contradict the staffs' perceptions of PDA.

5.1. Is PDA beneficial?

The literature suggests that a fundamental advantage to the implementation of a PDA plan in an academic library is that it offers users immediate electronic access to a large quantity of material (Polanka and Delquié, 2011; Downey et al., 2014). All six of the interviewees concurred that immediacy is most definitely one of the main positive aspects of PDA. One interviewee said that

It's being able to give people what they need when they need it.

(Interviewee D)

One interviewee specifically made reference to the fact that PDA is excellent for those users who are not always able to be on campus

A lot of my students in this faculty are distance learning students so they're not physically here so eBooks suit them perfectly because they can access them from wherever in the world they are.

(Interviewee E)

The majority of the interviewees agree that the inclusion of a PDA plan can broaden a collection and develop the kinds of level of collection depth and breadth that is desired but is often not feasible because of the amount of funds that would be needed in order to achieve it. Breitbach and Lambert (2011, p. 17) stated that PDA programs enable libraries

to load a significant amount of extra content into their catalogue without having to commit to a purchase. Interestingly, Interviewee A cited that this was actually, in her opinion, one of the biggest benefits to PDA

[PDA gives you] lots of content immediately that you don't have to pay for immediately, as there's obviously more content being made available than you actually put money in.

Not all of the interviewees thought that this was necessarily an advantage; one had a concern that giving the user the opportunity to choose content for the library risked unsuitable material being added to the collection. However, this did not emerge as a particular worry for the majority of the interviewees as they recognise that the library still exerts a lot of control over the parameters that are set at the beginning of the process. This is also acknowledged in the literature with Dahl (2012, p. 122) noting that

Though by its very nature PDA cedes control of some selection decisions to library users, varying levels of control can be built into PDA programs according to the needs and comfort levels of the institution.

When discussing traditional collection selection methods De Fino and Lo (2011, p. 327) suggest that collection development “has been an educated guessing game” and that, often, the choices that librarians make do not always correspond with what the users actually need. One interviewee reluctantly admitted that, in his personal opinion

You can't criticise the work that Subject Librarians do because they are skilled and they do make decisions but it doesn't matter how much experience you've got, you could still end up purchasing something that's never used.

(Interviewee C)

Interviewee C acknowledged that users may actually be in a better position to know what material is relevant to them and went as far as to suggest that

I think if we actually created collections based upon what people use then I think that would probably be more successful than people choosing what they think might be used but is never used... With a PDA eBook it has always been used at least once so you know that, for whatever the cost is attributed to the purchase, at least it has been used by somebody and in some cases it has been used more than once.

However, another of the interviewees took an entirely different view

I know stats show that PDA texts are used more than librarian selected ones, that doesn't necessarily mean they're more useful! We, I think in some of this,

are forgetting our educational role – we are not Tesco, we are not giving what they want... we are giving what they need.

(Interviewee B)

Stone and Heyhoe-Pullar (2015, p. 22) allude to the fact that a common complaint by students in their Staff Student Liaison Committees and via NSS feedback is about the dearth of books in libraries. They suggest that PDA is a possible solution to this.

Interviewee F supports this in his comment about student satisfaction feedback

In terms of student feedback we get, both anecdotally and in surveys, there will be some students who will notice there is more stuff and they will be happier... and er, you know, that I'd hope that the kind of things like PDA... will have helped with that.

5.1.1. Promotion of the service

One method used by Library Y to avoid any misuse of the PDA was to take a soft launch approach during and after implementation. The intent was for the library users to find the titles when carrying out their usual catalogue searches. Fischer et al (2012) and Reiners (2012) noted that during their PDA pilots they also made the decision not to formally advertise the new service. However, in both of these cases this was because of a concern that active promotion could potentially lead to a “possible skewing of purchases” (Fischer et al., 2012, p. 472). At Library Y, though, this was found to cause confusion amongst users. Because of a lack of instruction or explanation Subject Librarians reported confused comments by users who noticed that something ‘odd’ was happening when PDAs ended and items were withdrawn from the catalogue. One interviewee noted that somebody came up to him and said

Oh, there's this funny thing going on with the catalogue!

(Interviewee F)

5.2. Is PDA cost-effective?

Schroeder (2012, p. 12) notes that much of the PDA literature suggests that the primary method used to measure the performance of a PDA is the analysis of cost and usage data. She does go on to say that, on occasion, the success of a PDA has been measured by comparing PDA with traditionally acquired eBooks. Both of these approaches were taken during this study and the findings were presented in the previous chapter.

During the interviews the participants did not know the outcome of the cost and usage analysis and so their comments about the cost-effectiveness of PDA were purely based on their own opinions. One interviewee recognised that PDAs have the potential to be more cost-effective than the eBooks purchased by the Subject Librarians and conceded that

Subject Librarians think that they know what people want but you always end up buying the odd thing that doesn't get used.

(Interviewee D)

Another interviewee commented that

There's a perception that a lot of material that's just bought by Subject Librarians or by libraries generally isn't used because students don't want to use it; I'm not so sure about that.

(Interviewee F)

In fact, the results showed that rather than '*the odd thing that never gets used*' - a large proportion of those eBooks selected and purchased by the Subject Librarians have no usage at all. This suggests that Interviewee F's comment about Subject Librarian selected material not being used is just a perception is actually a reality and is corroborated not only by the usage data from Library Y but also from other studies. Fischer et al (2012, p. 472) state that a study comparing librarian selected and user selected eBooks at five academic libraries from 2005 to 2009 showed that "user-selected titles were, in fact, used twice as often as librarian-selected titles, on average 8.6 times per year vs 4.3 times per year for librarian-selected titles". Interestingly, the study found that the majority of PDA books experienced between 2 and 10 user sessions. This was exactly the same result for the PDA titles purchased from both Vendor 1 and Vendor 2 at Library Y (see Charts 1 and 3).

The results from the data analysis of the cost and usage figures for PDA purchased eBooks and Subject Librarian selected eBooks at Library Y confirmed what the majority of the existing studies into PDA implementation say. Like the results from studies undertaken by Tynan and McCarney (2014); Stone and Heyhoe-Pullar (2015) and Egan et al (2016) the results from Library Y highlight that materials purchased via PDA are usually more cost-effective than those selected and acquired by Subject Librarians because they have higher circulation. However, unlike the existing literature, two interviewees emphasised the importance of taking into account the hidden costs of PDA –

primarily staff time. Polanka and Delquie (2011, p. 128) state that “patron-driven programs generally take much less staff time than most acquisition processes”. This was most definitely not the experience at Library Y, at least in the initial processes of the implementation. When asked whether they thought PDAs involved more or less work than Subject Librarian selected eBook orders the majority of the interviewees automatically responded with ‘much more work’. However, on expansion of the answer and explaining the procedures involved with PDA implementation some of the participants amended their initial response and conceded that once the problems with lists and the duplication of content had been resolved they could see that, yes, eventually PDA could become the most cost-effective method of eBook acquisition.

The more we do PDAs the less complicated it is for us because we have our processes in place... [PDA] adds so much value to our collections that the effort you put into it returns on the investment.

(Interviewee A)

Breitbach and Lambert (2011); De Fino and Lo (2011); Walters (2012) and Downey et al (2014) all argue that the MARC records supplied by the vendors for the PDA titles are not always completely suitable for adding directly into the catalogue. They state that, often, the metadata in the records needs altering or customising to suit the standard set by the library. They also suggest that this can lead to the preparation and implementation of the PDA program taking a lot longer than expected. The interviewees from Library Y fully agree with these statements. Interviewee C in particular found that the amount of work that he had to do in order to ensure that relevant and suitable records were being added to the catalogue was significantly more than expected and that this was mostly due to a lot of double checking of the tasks that the vendors should have done sufficiently but had not. He advises that any libraries considering introducing a PDA program need to be aware of the need to watch out for anomalies and mistakes in the lists and records being provided by the vendors at the early stages of implementation. One example he provided was

Even though we've sent them accurate lists of which titles we wanted to include and exclude they have on occasion sent extra MARC records for things that we haven't asked for and not included records that we did ask for. We have to basically check and double-check the work that they've done.

(Interviewee C)

5.3. Alternative purchasing options

It was noted in the introduction of the dissertation that the study was timely because Library Y was starting to consider alternative options to PDA and that EBA (Evidence-based Acquisitions) was one of the available options. During the interview process it emerged that one of the Subject Librarians had actually already taken part in an EBA trial. This meant that he had the opportunity to compare and contrast the two models. The interview process and questions asked enabled him to analyse and voice, in some detail, what he thought about PDA and it quickly became clear that he had a strong preference for EBA. Interviewee F's opinion was that, although similar to PDA in that a mutually agreed-upon list of content was uploaded into the catalogue and made available for the users to access, the purchase triggers are different. Titles that are selected and accessed are not immediately purchased as part of the plan – instead, a list of these titles is generated and the relevant Subject Librarian can make purchasing decisions at the end of the program

At the end, if there's anything I didn't want to buy, we didn't have to buy it. And, because we could see what had been used we could genuinely... the aftermath was there, you had a year's worth of use.

(Interviewee F)

Taking part in the interview process for this study has enabled this interviewee to consolidate his opinions of both purchasing models. It has allowed him to think, in depth, about points he may not have considered before, so much so that when asked whether he would recommend PDA to other academic libraries he stated that

I'd be more likely to recommend EBA because our experience was much better with that.

(Interviewee F)

Interestingly, when asked whether she would like to add anything further about her experience with PDAs, Interviewee B said that from what she had heard about the EBA trial from her colleague in staff meetings and from looking through one of the EBA lists of potential content she thinks that

[EBA] might be, I think, a way we'd all be happier with than... the anarchy of PDA.

(Interviewee B)

EBA was not specifically mentioned by any of the other interviewees.

The one aspect they did all agree on was that the implementation of a PDA does assist in addressing gaps in a collection. This is also highlighted by Shen et al (2011). In particular, one interviewee acknowledged that PDAs are excellent tools for when a library is

trying to build a particular area, especially when there isn't any subject knowledge specific to that.

(Interviewee B)

This response is almost identical to what Downey et al (2014, p. 140) believe about PDA (referred to by them as DDA – Demand-driven Acquisition) “the DDA model has also been shown to strengthen collections for emerging areas of study and interdisciplinary categories that often fall outside of the bibliographer’s area of responsibility”. These statements demonstrate that the opinion of at least one of the interviewees is in line with what the literature says and, although Library Y did have some preliminary set up issues during implementation, staff can still acknowledge the underlying benefits of the model.

One area where staff from Library Y and the majority of the literature concurs is that PDA would not be used as the single method of collection development. Three of the interviewees emphasised that they did not think that PDA could, realistically, be the only way of managing a collection

I like PDA, I'm a convert... I used to be quite cynical... but I don't think it does everything that you need collection development to do... for now, I definitely think that the librarian still has a key role to play in a little bit of collection development.

(Interviewee E)

Schroeder, Wright and Murdoch (2010, p. 195) follow the same train of thought as Interviewee E when they say that

Subject selectors still have a critical role in understanding research and the curriculum and can set the breadth and scope of titles we put in the catalog. We are not prepared, nor is it feasible to turn everything over to PDA.

Shen et al (2011) and Schroeder (2012) agree and suggest that PDA should be used as a useful supplement to, rather than a replacement for traditional purchasing methods.

Breitbach and Lambert (2011, p. 20) echo the thoughts of most of the interviewees when they say that

Mixing PDA eBook programs with other forms of collection management offers librarians the opportunity to meet the long-term goal of a well-rounded collection and the short-term goal of providing access to electronic content just in time.

However, Anderson (2011b) predicts that by 2021 PDA will be the norm for academic libraries because, in his opinion, the funding required to support traditional collection development practices will never return to the levels needed and libraries will need to move to these alternative purchasing methods in order to keep the users satisfied. Not one of the interviewees suggested that this may be the case in the future. The overall conclusion was, as Reiners states (2012, p. 36) “PDA will work alongside specialist librarian selection, which will focus on collection-building in a more holistic way to ensure balance”.

The final chapter, Conclusion, evaluates the findings, confirms that the aims and objectives have been met, relates the findings to the existing literature and makes suggestions for others considering participating in PDA.

6. Conclusion

The purpose of this dissertation was to investigate whether relevant members of staff at Library Y consider Patron Driven Acquisitions (PDA) to be an effective and efficient method of acquiring academic eBooks. Taking a case study approach and using mixed methods to collect data, the study has sought to collate the perceptions and opinions of these staff to explore whether they believe PDA to be a worthwhile acquisitions process. The first stage of the research was to undertake a review of the literature in order to gain an overview of what had already been published about PDA and to highlight any gaps in the existing research. This process also contributed to the formulation of questions for the subsequent interviews. Primary data was obtained via six face-to-face semi-structured interviews with key members of staff from Library Y who had been involved with the implementation of two PDA plans. This method enabled the gathering of subjective views from those staff members. The additional analysis of the cost and usage figures of eBooks purchased via PDA and those selected and purchased by the Subject Librarians contributed statistical evidence which could then be used to complement or contradict these views.

6.1. Aim and objectives

6.1.1. Aim

The aim of determining whether the implementation of PDA at Library Y is considered to be an effective and efficient method of acquiring academic eBooks has been achieved. The interviewing of six key members of staff enabled a thorough exploration of their perceptions, opinions and experiences of PDA and provided valuable personal insights which the literature is unable to offer. The combination of these perceptions and the existing literature can help to contribute to a fuller appreciation of PDA.

6.1.2. Objectives

1. Identify and outline the Patron Driven Acquisitions procedure currently undertaken at Library Y

The interviews with various members of staff provided detailed accounts of the experiences and practices of PDA at Library Y. The selection of questions included in the

interview schedule enabled the participants to identify areas of the model they felt to be particularly positive as well as those which gave cause for concern. These questions also provided the opportunity for staff to comment on traditional purchasing methods thus enabling the researcher to obtain a comprehensive understanding of all eBook purchasing practices at this library.

2. Explore current literature to ascertain existing opinions about Patron Driven Acquisitions in the wider academic community

The literature review identified that a large section of the material published about PDA has been written by individuals reporting on the specific practices in their libraries. Much is recorded about the actual implementation of PDA programs including what parameters are decided upon and how the plans are customised and many authors discuss methods for measuring the success of these plans. There are discussions about the benefits and drawbacks of the effect of PDA on collection development. However, the researcher noticed that there was little coverage of the overall impressions and opinions of library staff (particularly in the UK) about PDA and about whether those staff consider PDA to be a worthwhile process. The interviews from this study highlighted strong feelings from most participants about the amount of unexpected work involved in the setting up of PDAs – a point which appears to receive sparse coverage in the existing literature.

3. Identify and examine individual staff perspectives (from Library Y) about their experiences of Patron Driven Acquisitions

The interviews identified that, on the whole, the staff at Library Y do recognise that PDA can be a beneficial addition to traditional eBook purchasing methods. They acknowledge that major advantages of PDA include the fact that the programs provide the catalogue with a great deal of content which broadens the availability of material without the library having to purchase all of it. Access to purchased titles is immediate and the users are selecting the materials themselves so it is demand driven. However, all interviewees emphasised that PDA is very time-consuming in the implementation stage and often includes much correcting of vendor errors. Some also note the fact that unpurchased items can disappear from the catalogue at the end of the plan which can cause problems.

4. Compare the cost and usage figures of eBooks purchased via a Patron Driven Acquisitions program with eBooks purchased by Subject Librarian recommendation, in order to verify or contradict the staff perspectives

The data shows that PDA purchased eBooks are used significantly more than those eBooks selected and purchased by Subject Librarians but when looking at cost per use there is actually little difference between the two methods. These figures correspond with studies reported on in the existing literature. However, the interviewees at Library Y noted that there are additional costs to factor in when analysing the cost-effectiveness of PDA (most notably staff time) but that there are more benefits to PDA than just the price of the titles.

5. Provide a critical evaluation of Patron Driven Acquisitions as a method of purchasing eBooks at Library Y

The previous points demonstrate that a critical evaluation of PDA has been undertaken.

6.2. Reflections on the methods used

The case study approach was appropriate for the investigation of the use of PDA at a specific academic library as it allowed for the detailed and intensive analysis of one single case. The data collection methods of semi-structured interviews and analysis of cost and usage figures have been effective and provided sufficient relevant information to be able to draw satisfactory conclusions. The review of the literature provided a detailed background for the research and highlighted gaps which the study has aimed to address. It also enabled the researcher to create relevant and useful interview questions.

6.3. Limitations of the study

Although the case study approach was suitable for this research it does mean that the study is based on the thoughts and opinions of the members of staff from only one academic library and their experiences of PDA from only two vendors. Therefore the findings of the study may not reflect the findings from other academic libraries. The study design was effective as were the methods used to collect and collate the data. However, to gain a wider range of opinions and perspectives it would have been useful to conduct interviews with staff from other academic libraries who have had experience with PDAs from other vendors.

6.4. Recommendations for future research

This study has explored the opinions of the staff at Library Y about PDA and its aim has been achieved. From the interviews conducted other possible areas for investigation emerged - comparing experiences with staff from other academic libraries and comparing PDA with EBA were two such areas.

6.5. PDA – is it an effective and efficient method of eBook acquisition?

Ultimately, this study found that, for staff at Library Y, PDA is considered to be an effective model for acquiring academic eBooks when used in conjunction with the more traditional method of Subject Librarian selection and purchasing. This is in line with the majority of the existing literature on PDA. The interviews identified a significant drawback to PDA (at least in Library Y's experience) in that the initial set up procedures and implementation of the programs can be extremely time-consuming and often include a lot of double-checking of the preliminary preparations undertaken by the vendors. Despite a number of reservations, the majority of the staff from Library Y would recommend the use of PDAs to other academic libraries citing the immediacy of access, potential to fill gaps and increase the breadth and depth of collections and the fact that material is purchased specifically based on user demand as the main reasons for doing so. A number of the interviewees indicated that alternative eBook purchasing models, specifically EBA, may be a preferred method of acquisition and that this option will be considered in more detail at Library Y.

Overall, the consensus was that PDA is a worthwhile process to undertake in an academic library provided that other purchasing methods are used alongside it. Also it is very important to understand potential implementation issues when considering the introduction of such plans.

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Appendices

Appendix A - Email to potential interviewees

Dear.....

As you may know, I am currently undertaking a dissertation to complete an MSc in Information and Library Studies from Aberystwyth University. The subject of my dissertation is staff perceptions of Patron Driven Acquisitions (PDA) in a UK academic library.

For the purpose of my dissertation I would like to interview key members of staff who have had experience of PDA. I would be grateful if you could let me know whether you would be willing to participate or not by replying to this email.

The interview will last no more than one hour and the date; time and place can be arranged at your convenience.

I would like to record the interview and transcribe it for use throughout the process, if you would rather I do not do this please let me know prior to the interview.

Please note:

All interviews will be anonymous and names will be removed at the transcription stage.

- All transcripts will be stored securely on my laptop and kept for only as long as necessary.
- All the information provided during the interview will be treated confidentially.
- Any direct quotes taken from the interview and included in the dissertation will be used anonymously. The University and names of any suppliers mentioned will not be identifiable.
- If you wish, you can request a copy of the transcript of your interview.

Please let me know if you have any questions and when would be a suitable time for the interview to take place.

Thank you in advance for your participation,

Emma.

Appendix B – Interviewee consent form

Consent form

Title of project: Master's Dissertation (working title): Perceptions of Patron Driven Acquisitions (PDA) from members of staff at a UK academic library.

Name of student/researcher: Emma Turner

Project authority: This research project is being undertaken as part of a Master's in Library & Information Studies from Aberystwyth University.

Please
tick

1. I confirm that I have read and understand the *Information Email* dated 19/07/2017 for the above study. ☒
2. I have received enough information about the purpose of the interview. ☒
3. I understand that my decision to consent is entirely voluntary and that I am free to withdraw from the study at any time without having to give a reason. ☒
4. I agree that the data I provide may be used by Emma Turner, within the conditions outlines in the *Information Email*. ☒
5. I agree to the use of any anonymised direct quotes in the report. ☒
6. I agree to take part in the above study. ☒

Name of participant [Redacted]	Signature [Redacted]	Date 26/7/17
Name of researcher Emma Turner	Signature [Signature]	Date 26/7/17

Appendix C – Interview schedule for Electronic Resources Librarian and Chief Library Assistant (Acquisitions)

Could you give a brief summary about your involvement with PDAs

Would you say that PDAs are more or less work than firm order e-Books?

Do the suppliers make the administration of PDAs easy or difficult? Please explain.

Is PDA a cost effective acquisitions model?

In your opinion how does PDA align the library's collection with user requirements?

What are the benefits of PDA?

What are the drawbacks to PDA?

Would you recommend the use of PDA to other academic libraries? (if yes, why. If no, why not)

Is PDA the future of collection development?

Is there anything else you would like to add about your experience with PDAs?

Appendix D – Interview schedule for Subject Librarians

Could you give a brief summary of the PDA you ran e.g. the subjects included in the parameters

Would you say that PDAs are more or less work than firm order e-Books?

Is PDA a cost effective acquisitions model?

Do you think PDA is suitable for your subject area?

Is there anything you think could have been done differently with your PDA? (broader / narrower classmark range, etc.?)

What are your reasons for choosing to run a PDA? (budget spending / more choice for students)

Have you mentioned PDAs in SSLC meetings? If so, what reaction do you get?

Do you think students have noticed the implementation of PDAs?

In your opinion how does PDA align the library's collection with user requirements?

What are the benefits of PDA?

What are the drawbacks to PDA?

Would you recommend the use of PDA to other academic libraries? (if yes, why. If no, why not)

Is PDA the future of collection development?

Is there anything else you would like to add about your experience with PDAs?

Appendix E – Extracts from two interviews demonstrating how themes were identified through open coding

Themes: **Benefits** **Problems** **Subject Librarians** **Students** **Cost**
effectiveness
Recommendation

On the benefits of PDA

Interviewee B:

To me, it's the serend...well in fact to both of us...the **serendipity** of having stuff that I never would have thought of buying that the student wants. That's brilliant. And it is **instant** for them so that's, that's like, you know, they will get very pleased because there's something that they thought we wouldn't have anything on...there it is, the actual book. But you've got the same with things like e-brary...we've got an enormous package and there's things I never would have thought to buy and there they are at the top of the downloads list...ooo, ok, so it sort of replicates that, really. Er, it looks good for us because suddenly we've got thousands of books although they then disappear so that doesn't look so good. Erm, I really did appreciate the being able to **address that gap** for the Masters students, er, that was, and not just Masters students; it's the time when academics have their most chance to do research and, ok, they're still going to be around next year but they want, they said 'oh, there's this book and I've got time to read it' 'Yeah, but I can't buy it for you till August' Erm, so it was really good to be able to do something about that, erm, and, I would say (sigh) I think it did **increase satisfaction** but it's hard to tell; our satisfaction rate had been pretty good before and it was pretty good afterwards.

Interviewee F:

I think it does give opportunities for students to **get hold of material that I don't think is necessarily right for them**. But then, I guess, if you have a system like that that's gonna happen to some degree. Erm, (sigh) I think, I suppose my feeling about PDA and similar systems is that what it's doing **is bulking out our coverage**. We haven't got the time to develop the kind of levels of collection depth and breadth we would like, we don't have the money to do it.

Oh right. So, what are the benefits. Well, it does, ok, so it's giving us a degree of **bulk in terms of our coverage**, as I've just said and that bulk of course, you know, is partly temporary but it does mean **we're making a bigger offer** at least temporarily to our students and therefore they can **choose things which maybe we would never have considered** to have bought which might be, you know, contrary to what I said in the previous answer. You know, potentially they're picking up on things which, er, we were making available things which we never would have considered of buying and is **very good material and is bang on what they want**.

On the problems with PDA

Interviewee B:

Much more work. So, I'm thinking specifically of the Life Sciences. So, we've got one here: 'Life, optometry, health and engineering' which, if memory serves, was a 25,000 line spreadsheet...

Interviewee F:

With many PDA items there all kinds of **very restrictive usage agreements**, whatever they're... I can't think of the phrase, you know what I mean... it's one, you know, one user, three user whatever der der der... there's a lot of that and it's caused, that's been problematic subsequently in that it's been, we've had the reports come back saying there's lots of people trying to get into this book or whatever and we've had to buy additional copies and stuff like that.

On Subject Librarian attitudes

Interviewee B:

Once that bit was done it was, er, just a matter of, erm, ___ would send us reports and we, we keep an eye on what's going on. Most of what was bought I would not consider to be priorities. Now, this is the whole thing with PDA, it's **student choice** but 'Ten countries in the world we never, we a hundred in the world we've invaded and ten we never got round to' ...that's just somebody who's looking for an interesting read, which is fine but that's not a priority for spending our money. So, and, er, I know stats show that PDA texts are used more than erm librarian-selected ones, that **doesn't necessarily mean they're more useful!** We, I think in some of this, are forgetting our educational role... **we are not Tesco**, we are not giving what they want, we are, we are like a gym... **we are giving what they need**; we're a doctor. Now it doesn't work unless you take the prescription so I don't think we should be entirely, I mean obviously there is the student voice and the student choice and all of that but **we should not entirely be handing over our collection development** to what they want.

On PDA and students

Interviewee F:

... when things are withdrawn and so on and so forth. And so that's one particular area where people noticed something was happening and **we had to explain what was going on**. I suppose the question is, are students saying 'ooh, we've got lots of lovely books to read' and I think the problem with that is of course, is that I don't think that it would have been noticed specifically, I think there are, in terms of student feedback we get, both anecdotally and in surveys, there will be **some students who will notice there is more stuff and they will be happier** and so individually they might say 'oh, I've found lots of stuff on my topic' or 'I've found this and this and this'. Now, you don't check and you don't know, 'cos I haven't seen specifics but potentially that's PDA-related. Similarly, in surveys, people might say 'Are you happy?' 'I'm happy.' And our stats have gone up and in Peace Studies, certain areas certainly our stats have gone up a bit and er, you know, that, I'd hope that the kind of things like PDA and other types of programme we've had running will have helped with that but has somebody come up to me and said '**oh, there's this funny thing going on with the catalogue**' er, no, not unless it's been a problem.

On the cost-effectiveness of PDA

Interviewee B:

Cost-effective? Possibly because my time when I'm on a bus in Aviemore doesn't cost anything, cos I wasn't meant to be at work that day. So **there's hidden costs. Staff time,** and I'm sure Acquisitions will have a lot more to say about that 'cos what we got was after they had put in a shedload of work to it. Erm, so, there is the hidden cost. **The per item cost, yea fine...**

Interviewee F:

I don't think we've done sufficient analysis so far to be clear about that. With PDA you're always bargaining you're getting **more content for a lower overall price** and that includes staff time and all those other factors as well, 'cos **individual purchasing is more expensive** on that side, erm, proportionate to the amount of use you'll get from the material and hopefully, because students are making those choices about what is used, it will be more cost-effective in that the material is used more but I'm not sure, there are a number of factors that I don't think we've fully done the analysis on yet in terms of the levels of use of items that were selected during the PDA, after the PDA and how that relates to the material maybe we buy just on spec as part of our natural purchasing...

On recommending PDA

Interviewee B:

I think that if you were **trying to build a particular area**, especially **when there isn't any subject knowledge specific to that**, I mean ifthe school is a really bad example but we're about to do, er, launch a course in mathemat...computational chemistry, that's it.

Interviewee F:

Erm, I think I **wouldn't use the word 'recommend'**. I think I would say I think it's something they should **consider seriously** and they should look at it and think about what they want to get out of it.

Erm, so, yeah, erm, so recommend...no, I think **offer advice**...yes. OK. I'd be more, as I said, you know, you can probably tell from my previous answer, I'd be more likely to recommend EBA.